

EDRMS Implementation Readiness

An Enterprise Document and Records Management System (EDRMS) is a software application capable of managing all types of electronic and physical records throughout their information life-cycle, from creation, to use, to final disposition. [EDRMS Content Manager](#) is the latest version of the government's standard EDRMS.

The government's standard EDRMS is intended to:

- ◆ Provide shared, controlled repositories for filing and management of government records (email, MS Office documents, and any other electronic documents not already in a database).
- ◆ Enable tracking of physical files, including records migrated from the Corporate Records Management System (CRMS).
- ◆ Provide a powerful tool for search and retrieval of records from a single location for operational, legal, and other requirements.
- ◆ Ensure the records that offices require for business operations are:
 - Readily identifiable and retrievable via standard metadata;
 - Protected against unauthorized access and alteration;
 - Properly retained and destroyed in accordance with approved information schedules.

EDRMS Content Manager is the only application that currently provides ministries with all the records management functions and controls required to manage digital information according to information schedules. Under the [Information Management Act \(IMA\)](#), all government information must be managed in accordance with information schedules.

EDRMS Implementation Services

Government Records Service (GRS) implements EDRMS Content Manager where Ministry clients have executive sponsorship for change management and information management best practices in place.

Projects may include onboarding for physical or electronic records management, or both. Onboarding may be for the management of all a business unit's records, a selection of records, or only the records related to a single business function. Project length is a minimum of 6 weeks and may extend to several years dependent upon scope and size of the project and/or client group.

EDRMS Project Services include:

- ◆ Configuration and user set-up;
- ◆ Software installations and instructions;
- ◆ Training sessions;
- ◆ Demonstrations;
- ◆ Online training and dedicated project training;
- ◆ Business help desk, including initial desk-side support session for each staff member.



CORPORATE INFORMATION AND RECORDS MANAGEMENT OFFICE GOVERNMENT RECORDS SERVICE

A project implementation may include other activities, such as those required to support adoption of a culture of electronic records management in a business unit.

Branch Readiness for Implementation

While many variables contribute to readiness, the following four criteria are generally considered predictors of a successful EDRMS implementation:

1. **Program staff embrace managing records as their responsibility.** Although using EDRMS Content Manager to file and retrieve electronic documents is often less complicated than using a shared drive (LAN), staff members can resist using a records management tool. The reluctance is often rooted in the perception that records management is a clerical responsibility; it is not specific to the EDRMS Content Manager application.
2. **EDRMS implementation is supported by leadership.** Success is more likely when executive appoints committed sponsors and continuously reinforces its commitment to appropriate information management, and the new way of managing records.
3. **Change management is supported at all levels.** Communication and user support are essential to successful adoption of EDRMS Content Manager. New users will not accept change unless the benefits to them are clearly communicated and ongoing updates are available. Users need to see evidence the project is a priority for Ministry leadership.
4. **Clear processes.** EDRMS Content Manager cannot be implemented or used successfully if a program or ministry does not have basic processes established to manage records. These include: assigning responsibilities for filing, determining common classifications, establishing file and document naming conventions to support searches, establishing regular file management schedules (closing files, transferring files, arranging for destruction of eligible files, etc.).

To discuss your business area's readiness for implementing EDRMS Content Manager, please contact:

Sharon Larade
EDRMS Business Services Manager
Sharon.Larade@gov.bc.ca

Implementation Process Map

